



# **Standard Clinic - Clinic Administrator**

User Manual

Version 3.4.2021







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#### Introduction – Welcome to VAMS

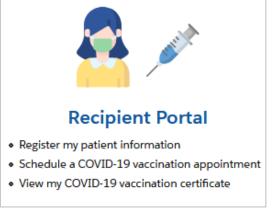
The Vaccine Administration Management System (VAMS) is a secure, web-based tool built to help jurisdictions, vaccination clinics, organizations, and vaccine recipients manage COVID-19 vaccination efforts. It supports operations, data collection and tracking to meet COVID-19 vaccination requirements.

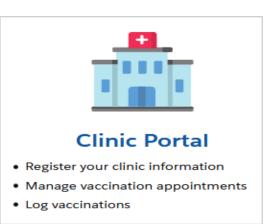
#### **Four Portals**

Each portal is designed for a specific type of user.









- "Organization" refers to any institution, association, company, or other group that will add critical infrastructure workers and other at-risk groups in VAMS to be considered for COVID-19 vaccination. "Member" is one example of an organization.
- > Vaccination clinics are often referred to as "vaccine clinics" in VAMS.







#### **PRIVACY NOTE**

To receive the COVID-19 vaccine, personally identifiable information (PII) and protected health information (PHI) will be entered into VAMS. PII is any data that could potentially identity an individual. PHI includes demographic information and relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA visit: <a href="https://www.cdc.gov/phlp/publications/topic/hipaa.html">https://www.cdc.gov/phlp/publications/topic/hipaa.html</a>

#### How to Use the User Manual

This manual is to be used by the Clinic Administrators to better understand and manipulate VAMS. In this guide, you will find step by step instructions along with images of the pages to assist you while manipulating VAMS. This User Manual focuses on the functions a Clinic Administrator will perform in a **Standard Clinic**. For information about navigating your **Third-Party Clinic**, please see the Third-Party Clinic User Manual and Quick Reference Guide.

#### Disclaimer

The content contained in WV VAMS training materials is provided only for educational and informational purposes for the clinic users in West Virginia. West Virginia attempts to ensure that content is accurate and obtained from reliable sources but does not represent it to be error-free. West Virginia does not warrant that any functions on the VAMS website will be uninterrupted, that defects will be corrected, or that the website will be free from viruses or other harmful components. Any links to third party information on the website are provided as a courtesy and do not constitute an endorsement of those materials or the third party providing them.







# **Your Role and Responsibilities**

Your role in VAMS is critical to the clinic's success. As a Clinic Administrator, you will use VAMS to define and manage your clinic's information, such as location and operating hours, add clinic staff as VAMS users, manage inventory, create treatment stations, and manage day to day functions.

The table below illustrates the activities that only you, as the Clinic Administrator, can perform in VAMS.

	8	<u></u>	8	<b>A</b>
Role	Clinic Administrator	Clinic Inventory Manager	Clinic Front Desk	Clinic Healthcare Professional
Serve as the clinic's point of contact for your jurisdiction	✓			
Set and manage clinic schedule	✓			
Manage clinic's vaccine inventory	✓	✓		
Add and manage VAMS users	✓			
Check in vaccine recipients			✓	
Create walk-in appointments and cancel recipient appointments			✓	
Administer vaccine to recipients				✓
View next dose eligibility dates				✓

**NOTE**: Your clinic must have a Clinic Administrator, Front Desk, and Healthcare Professional to maintain clinic operations. The Inventory Manager role is not required because the Clinic Administrator can manage inventory.





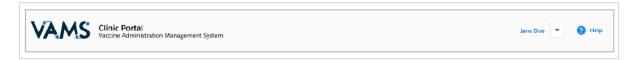
## **Navigating VAMS**

**Quick Tip:** VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile devices.

To access VAMS, visit: <a href="https://vams.cdc.gov/vaccineportal/s">https://vams.cdc.gov/vaccineportal/s</a>

Below you will find ways to help you navigate VAMS:

#### Header/Banner



Clicking the **VAMS** logo will return you to your portal's home page. The **Help** link will take you to a list of frequently asked questions (FAQs). The arrow beside your name will drop down and allow you to **log out** of the system.

#### **Tabs**

Tabs are available at the top of the page and allow you to move between pages. The tab you are currently viewing will be underlined and bolded.



#### **Buttons**

Buttons will allow you to start, advance, and complete tasks.



#### **Tables**

Tables allow you to sort and filter information. You can view details by clicking the links in each row. You can also filter the columns by clicking on the table headers.







# **Set Up Your Clinic in VAMS**

There are four steps to set up your clinic in VAMS. Once you set up your clinic, you will be able to:

- Schedule appointments for your clinic,
- The Front Desk Staff will be able to check in recipients,
- The healthcare providers will be able to log vaccinations,
- You or your Inventory Manager will be able to manage inventory.







## Activate your User Account



To start this step, you will need:

- Internet access
- Email account access
- Registration email from no-reply@mail.vams.cdc.gov

After the Jurisdiction POC enters your name and email address into VAMS, you will receive an email containing a link to create a VAMS account.

- > **Tip**: Check your spam or junk folder if it is not in your inbox. If you still cannot find the email, contact your Jurisdiction POC.
  - 1. **Check** your email for the link to set up your account.
  - Click the registration link in your email. You will be taken to the account creation page.

**NOTE**: The registration link is for your registration only and cannot be used to register anyone else.



Once you click the link, you will be taken to a page to create a password.

- 3. **Verify** your email address.
- 4. **Create** your password.
- 5. **Check** your email account for a verification code.
- 6. **Enter** the verification code.
- 7. Read the terms and conditions and check the box if you agree.
- 8. Click Create Account.

	Hi, Jeff. Welcome to VAMS
	Please create your Account to Access the Employer Module
Your Username	
69d9c929-da	95-469c-81ae-6989321c4277@mailslurp.com
Your passwor	d must be at least 8 characters long and include at least 3 of the following categories:
• 1upper	case character
	case character
• 1 numb	
• 1specia	l character o
*Create Passio	ort
	•
*Verify Passwo	and and an analysis of the second analysis of the second and an analysis of the second and an analysis of the second analysis of the second and an analysis
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	your email for your verification code. The verification code will be valid for 15 minutes. If expired, please refresh the page to generate a new
verification co	
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accessing this only. Unautho any lawful Gor data transiting	This service haves provide privacy and security redices consistent with applicable federal tests, directions, and other federal gladers of the Comments returns with includes all effects straign ended astructions. Both systems. This private provided for Comments authorised some provided for Comments authorised some requirement approaches to provide a provided for a comment and to straight and may result in disclosinary action and sort of all and criminal penalties. At any time, and for exercised for improper use of this system is provided and may result in disclosinary action and out of all and criminal penalties. At any time, and for exercise provides the provident any any other access of any daily systems usuage and for interest, search and safety any communication or or toxicol on this system. Therefore, you have no reasonable expectation of privacy. Any communication or data transiting or stored on this disclosed or used for a related Commenting unitarity and comments.
✓ By Check	ing this Box, I Agree to the specified terms.

NOTE: After five unsuccessful login attempts, you will be locked out for one hour.

#### **CONGRATULATIONS, YOU SET UP YOUR ACCOUNT!**





# **Register Your Clinic**



#### To start this step, you will need:

- Clinic name
- Clinic type\*
- Primary address
- Shipping address
- Phone number
- Your email address

#### \*Clinic Types

**Clinic:** Healthcare setting providing outpatient care with one permanent location for vaccination

- Can receive inventory at permanent location or at an alternate shipping location
- Examples include urgent care centers, retail clinics, federally qualified health centers, etc.

**Hospital:** Healthcare setting providing inpatient and/or outpatient care with one permanent location for vaccination

- Can receive inventory at permanent location or at an alternate shipping location
- Examples include for-profit community hospitals, Veterans Affairs medical centers, nongovernment not-for-profit community hospitals, etc.

**Pharmacy:** Clinic with one permanent location for vaccination

- Can receive inventory at permanent location or at an alternate shipping location
- Examples include retail pharmacies, community pharmacies, clinical pharmacies, etc.

**Other:** Select "other" if your clinic doesn't fall within one of the categories above and you would like to label it differently.

**Pop-up:** Clinic with a temporary location for vaccination

- Requires permanent address to receive inventory
- Examples include temporary vaccination sites at workplaces, schools, government facilities, etc.

**Mobile:** Clinic with multiple locations for vaccination

- Can change physical address for vaccinations
- Requires permanent address to receive inventory
- Examples include mobile clinic bus, mobile clinic van, etc.

**Third Party:** Clinics in a setting such as a longterm care facility (LTCF) or correctional facility that will be responsible for administering vaccine to recipients

- Can receive inventory at permanent location or at an alternate shipping location
- · Recipients do not use VAMS
- Responsible for uploading list of recipients, administering the vaccine as part of normal course of care, and documenting when the vaccine is administered
- Not searchable by other VAMS users







Once you are logged into VAMS, you will see a progress bar at the top of the page:

- A green tab indicates you successfully completed that page.
- A blue tab is your current page.
- A grey tab has not been completed.



- You are directed to the Register Vaccination Clinic – Clinic Point of Contact page.
- 2. Ensure the information is correct.
  - a. If any information is incorrect, update it on this page.
- 3. Click Next.
- 4. You are moved to the **Register Vaccination Clinic Clinic Information**page.
- 5. Ensure your clinic information is correct.
  - If any information is incorrect, update it on this page.
- 6. Click Next.
- 7. You are taken to the **Register Vaccination Clinic Review** page.
- 8. Review all information.

To complete the registration process:

- Click the checkbox beside: By selecting this checkbox I confirm the above information is accurate.
- 10. Click Next.





- > NOTE: to make edits, click Previous.
- NOTE: You may edit any of the clinic information by using the drop-down arrow or updating the text boxes.

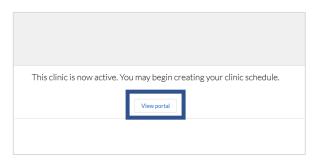
#### **Physical and Shipping Addresses:**

- The clinic physical and shipping addresses can be different if the vaccine will be stored at a different location than where it will be administered.
- Mobile clinics must have a permanent shipping address for inventory but can change their physical address.





11. Click **View Portal.**You are then taken to the **Clinic Portal**main page.



**CONGRATULATIONS, YOU REGISTERED YOUR CLINIC!** 





# Set Up Your Clinic's schedule



#### To start this step, you will need:

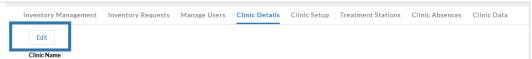
- Selected appointment duration at your clinic (10, 15, 20, or 30 minutes)
- Clinic operating hours
- Number of vaccination stations
- Operating hours for each vaccination station

#### Set up appointment durations:

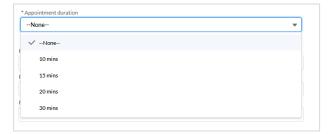
- 1. Log in to VAMS.
- 2. Click the Clinic Details tab. You will be taken to your clinic's detail page.



3. Click the **Edit** button located at the top left of the clinic details page. Some fields will be opened for you to edit.



 Use the arrow to select an Appointment duration to choose your clinic's appointment duration.



5. Click **Save** located on the top left side of the page.







#### Set up operating hours:

You will need to set up hours for each day your clinic is open. VAMS allows you to customize operating hours with the option to have one or multiple time slots per day.

6. Click the **Clinic Setup** tab.



- Click on your clinic's name in the Clinic Location Name column. You will be taken to your clinic's information page.
- 8. The Available for Scheduling? checkbox will automatically be checked. If your clinic is not ready to be open for appointments, uncheck the box by clicking the Edit button located on the upper right side of the page.
- 9. Enter a date in the **End Date** field. Select a date that is far in the future.
  - NOTE: the end date you set does not impact when recipients can schedule appointments.
- At the bottom of the page, you will see Clinic Operating Hours, click Setup Operating Name and Operation Hours.

You will be taken to the Setup operating name ad operating hours page.

11. Click the **Edit** icon (pencil) to name you clinic's operating hours.





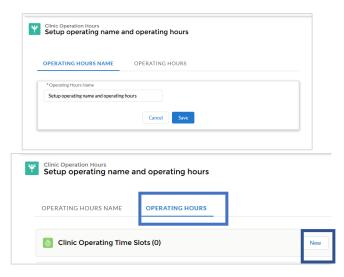


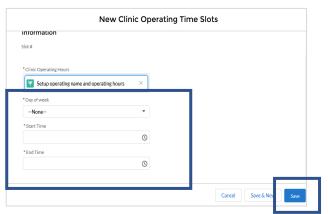


- 12. Enter the name of your clinic's hours.
- 13. Click Save.

- 14. Click the **Operating Hours** tab to add clinic operating time slots.
  Click **New.** A pop-up window will appear.
- 15. Use the drop-down menu to select the **Day of week**.
- 16. Select the **Start Time**.
- 17. Select the **End Time**.
- 18. Click Save.
- 19. Complete this task for each day your clinic is open.
- NOTE: If you want to add more days to your clinic, click Save and New. This will save your time slot and open another pop-up window to add another time slot.
- 20. Click the **VAMS** header to go back to the Main Page.

Next, you will set up appointment slots by adding vaccination stations and their operating hours.











#### **Add Vaccination Stations and Set Their Operating Hours:**

#### ➤ NOTE:

- Vaccination stations are currently called "treatment stations" in VAMS. The instructions below refer to treatment stations.
- You will create a treatment station for each vaccination station.
- No appointments will be visible to recipients unless one treatment station is set up.
- The number of treatment stations and their operating hours affect appointment availability at your clinic. For example:
  - Scenario 1: You have one treatment station whose operating hours are 8am-5pm on Tuesday, with an appointment duration of 20 minutes. This means a total of 27 appointment time slots will be available.
    - If a recipient schedules an appointment for 2pm on Tuesday, the recipient has taken the only time slot available for that treatment station. No other recipient will be able to select 2pm on that Tuesday.
  - Scenario 2: You have two treatment stations with the same operating hours and appointment durations. This means a total of 54 appointment time slots will be available.
    - The 2pm time slot will be available for two recipients because there are two treatment stations with operating hours from 8am-5pm.

#### **Create Vaccination Stations:**

- 21. Click the Treatment Stations tab.
- 22. Click New.



#### A pop up will appear.

- 23. Search for your clinic by entering the name in the **Clinic** search box.
- 24. Enter a **Station Name** for the treatment station you are creating.
  - TIP: Consider giving each treatment station a name that aligns with how they are referenced by healthcare professionals (e.g., Station A or Station 1).

New Treatment Station					
Intormation					
*Clinic					
Search Clinics	Q				
*Station Name					
Station 1					
*Start Date					
1/19/2021	繭				
* End Date					
1/28/2021	iii				
Station Operating Hours					
Search Station Operating Hours	Q				
+ New Station Operating Hours					
			Cancel	Save & New	Save

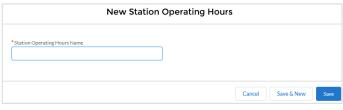




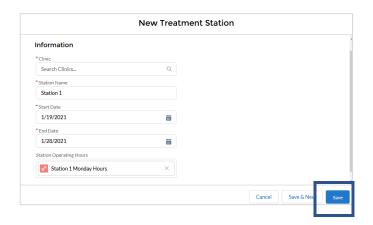
- 25. Select the Start Date.
- 26. Select the **End Date**.
- 27. For the first treatment station you create, click in the **Station Operating Hours** box and select **New Station Operating Hours**.
  - NOTE: For each station you wish to create, you will have the option to choose New Station Operating Hours.

A pop up will appear.

- 28. **Name** the set of operating hours for this treatment station.
  - TIP: Consider using a standard name (e.g., Station A Monday Hours).
- 29. Click **Save**. You will be taken back to the New Treatment Station pop up.
- 30. Once you have selected the Station Operating Hours, Click **Save**.



➤ **NOTE:** you can add additional treatment stations by repeating steps 21-29.



You will be directed to the **Treatment Station Details** page.

These next steps will assist you to **Set Treatment Station Operating Hours.** 

- 31. Click on the name of the operating hours for the treatment station. You will be directed to the Stations Operating Hours page.
- 32. Click Station Operating Hours.
- 33. Click New.

A **New Station Operating Time Slots** pop up window will appear.









- 34. Select the Day of the week.
- 35. Select the **Start Time**.
- 36. Select the **End Time**.
- 37. Click Save.

You can add another time slot for other days by clicking **Save and New.** This will open a new pop-up window.

- NOTE: You can add as many treatment stations in VAMS as needed.
- 38. Click the **VAMS** logo, in the upper left-hand side of the screen to begin the next step.







## **Assign Clinic Reservations**

You will be able to specify the percentage of first dose, second dose, and walk ins for a clinic you are setting up. For example, you can establish 50% of your appointments for first dose vaccinations, 25% for second dose vaccinations and 25% for walk in appointments per tier.

#### There are four tiers:

- Tier 1 is allocated for days 1-16.
- Tier 2a is allocated for days 17-27.
- Tier 2b is allocated for days 28-34.
- Tier 3 is allocated for days 35 and onward.

When setting the percentages, enter whole numbers (e.g., 50 not 50.5).

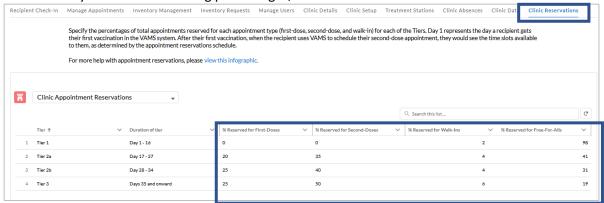
Free for all appointments are considered first come first served recipients. If there's a percentage that isn't set, that percentage will fall into this category. For example, if you allocate 80% of your appointments for first does, second dose, and walk ins, 20% will be set for free for all.

If you want to set all of your appointments to walk-in/free for all appointments, set the percentages to zero.

If you want to set your appointments for first dose only, enter 100% in the first dose column.

#### **To Set Your Percentages**

- 1. Log into VAMS.
- 2. Click on the Clinic Reservations tab.
- 3. Click in the % Reservation for... box to enter a percentage for that type of appointment.
- 4. Click the **edit pencil** icon to open the box. This will allow you to update the percentage.
- 5. Once you are done entering percentages, click **Save**.



**CONGRATULATIONS, YOU SET UP YOUR CLINICS SCHEDULE!** 

Treatment Stations Clinic Absences

appointments with your clinic.

Select a location

Limited service group type

Select an organization

Activate this limited service group

You can always change the status of a limited service group late





# Limit Availability to Organizations

You can limit your availability to facilitate specific organizations. These are known as Limited Service Groups. If you limit your availability to an organization, your clinic will only be visible to members of those organizations. The organizations must be registered in VAMS. You can create up to 10 Limited Service Groups.

#### To create a Limited Service Group

- 1. Log into VAMS.
- 2. Click on the **Limited service groups** tab.
- 3. Click Create. You'll be taken to the Create new limited service groups page.



- 4. Enter the **Limited service group name**.
- 5. Select the Location.
- 6. Select the **Limited service group type**.
- 7. Choose an **Organization** that is already established in VAMS.
  - NOTE: Only registered VAMS organizations in your jurisdiction will appear in this drop-down menu. If the organization you are searching for does not appear in the list, contact your jurisdiction POC to confirm the organization's registration status.
- 8. Click the box to Activate this Limited Service Group.
- 9. Click Create.

# To Edit or Deactivate a Limited Service Group

1. Click the name of the group you wish to edit or deactivate.



- 2. You are taken to the **Group Details** page.
- 3. Edit the fields.
- 4. Deselect the Active checkbox.
- 5. Click Save.





## **Add Clinic Staff as VAMS Users**



To start this step, you will need:

- Understanding of the VAMS Roles and Activity Matrix on the next page.
- Email addresses for each user you plan to add.
- ➤ **NOTE**: Your clinic **must** have the roles of a clinic administrator, front desk, and healthcare professional to maintain clinic operations. Since the clinic administrator can manage inventory, filling the inventory manager role is not required but is recommended.

Adding staff to VAMS will give them the access necessary to perform their duties in the system.

As the Clinic Administrator, you can assign multiple user roles to one user, which will give them access to perform additional tasks in VAMS. However, you should be familiar with the VAMS Roles and Activity Matrix located on the next page.

✓





# **VAMS Roles and Activity Matrix**

View next-dose eligibility dates

#### **VAMS Roles and Activity Matrix** Activity in VAMS Clinic User Role Clinic Inventory Healthcare Administrator Manager Professional Front Desk Serve as a clinic point of contact for your jurisdiction Manage clinic information (e.g., physical address, operating hours) Set and manage clinic schedule ✓ Manage (add, edit, remove) VAMS users ✓ Submit inventory requests ✓ ✓ Log vaccine inventory when received Log vaccine waste Monitor clinic vaccine inventory levels to match appointments scheduled Check in vaccine recipients Create recipient appointments ✓ Cancel recipient appointments Confirm recipient Identity ✓ View recipient medical history and personal information; add notes to record Log vaccine administration ✓ Administer vaccine to recipients Log vaccine waste that occurred during administration (if applicable)





#### Add clinic staff to VAMS

- 1. Click the Manage Users tab.
- Click **New**.A pop-up window will appear.



- Add the user's email in the Add or Update User box.
- 4. Click Search.

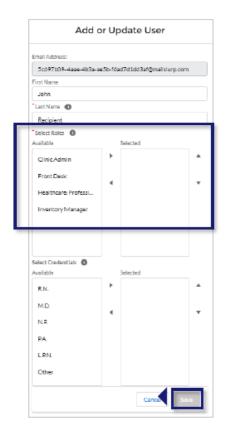
The Add or Update User pop-up will appear.

- 5. Enter the user's Email Address.
- 6. Enter the user's First Name.
- 7. Enter the user's **Last Name**.
- 8. Select the user's Role.
  - To select a role, click on the role title, in the Available box, click the arrow pointing to the right.
  - To remove a role from a user, highlight the role, in the Selected box, and click the arrow pointing towards the left.
- 9. Select the user's Credentials.
  - To select a credential, click on the credential, in the Available box, click the arrow pointing to the right.
  - To remove a credential from a user, highlight the credential, in the Selected box, and click the arrow pointing towards the left.
- 10. Click the checkbox stating you are not a robot.
- 11. Click Save.
- 12. A registration email will be automatically sent to the user with a link for them to set up their VAMS account.

Add or Update User

\*Email Address:

| Cancel | Search



You are directed to the Clinic Portal home page.





# **Daily Clinic Administration Tasks in VAMS**

You can manage daily tasks using VAMS. Below is a list of tasks you might use daily to complete your role as a Clinic Administrator.

#### **Clinic Operations**

# Manage Clinic Details

Manage clinic addresses, clinic type, and clinic appointment duration, deactivate
your clinic, check or uncheck the Available for scheduling? box to make your clinic
available or unavailable for recipients to schedule appointments in VAMS, add clinic
start and end dates.

# Manage Clinic Schedule

• Change operating hours or appointment duration, add or remove vaccination stations, create clinic and station absences.

# Manage Clinic Users

•Edit a user record, remove a VAMS user, or add a multi-clinic user.

#### **Clinic Inventory**

Log COVID-19 Vaccine Invenory

•Log vaccine inventory manually or via 2D barcode scanner (if available).

Reduce COVID-19 Vaccine Waste

• Log vaccine waste manually or via 2D barcode scanner (if available).

Monitor COVID-19 Vaccine Inventory Levels

• Use the Inventory Management page to monitor inventory levels and view snapshots of available and booked appointments.

#### **VAMS Support**

**Access Support** 

• Know how to find answers to frequently asked questions (FAQs) about VAMS.





## Manage Clinic Details

In this section, you will learn how to manage clinic addresses, clinic type, clinic appointment duration, deactivate your clinic, check or uncheck the Available for scheduling? box to make your clinic available or unavailable for recipients to schedule appointments, and add clinic start and end times.

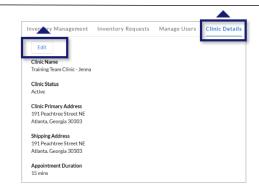
There are two ways to edit your clinic information, however, each selection offers different editing options. You can use the **Clinic Details** tab or the **Clinic Setup** tab. Below lists the options you can edit on each page.

#### **Clinic Details Tab**

- 1. Click the Clinic Details tab.
- 2. Click Edit.

Here you will be able to:

- Update your shipping address inventory.
- > Change duration of clinic appointments.
  - NOTE: Changing appointment durations will cancel previously scheduled appointments.
- Deactivate your clinic.



#### **Clinic Setup Tab**

- 1. Click the Clinic Setup tab.
- 2. Click your clinic's name in the Clinic Location table.
- 3. Click the **Edit** button in the upper right-hand corner on the Clinic Location page.



#### Here you will be able to:

- Update your clinic's physical address.
- Check or uncheck the Available for scheduling? box to make your clinic available or unavailable for recipients to schedule appointments.
  - ➤ **NOTE:** Unchecking the Available for scheduling box will not impact scheduled appointments
- Change your clinic's start and end dates.
  - ➤ **NOTE:** You will need to contact your jurisdiction POC to change your clinic's type. Once your POC has changed your clinic type, you will need to set up the clinic. The types of clinic's are listed in this User Manual. See **Add Mobile Clinic Locations and Operating Hours.**





### **Manage Clinic Schedule**

In this section, you will be able to change clinic operating hours or appointment duration, edit, add, or remove vaccination stations and/or their operating hours, create clinic and station absences.

#### Things to know:

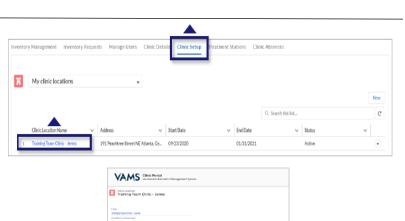
- Editing or deleting operating or treatment station hours will affect already scheduled appointments.
- A pop-up window will appear once you click Save alerting you that appointments might get canceled if you edit or delete time slots.
- Deleting or editing operating hours or treatment stations will impact the amount of time slots available for recipients to schedule appointments.

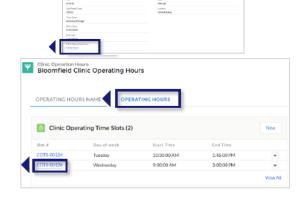
#### **Edit or Delete Clinic Operating Hour Time Slots**

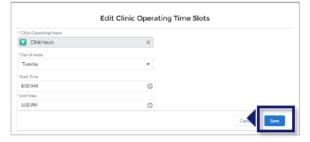
- Click the Clinic Setup tab.
- Click your clinic name in the Clinic Locations table.
- 3. Click the name of your clinic hours in the Clinic Operating Hours field. You are taken to the Operating Hours page.
- 4. Click the **Operating Hours** tab.
- 5. Click the **Slot #** of the time slot you want to edit or delete.
- 6. Choose to **Edit** or **Delete** at the top right corner of the page.

If you chose **Edit**, a pop up will appear.

- 7. Edit the hours.
- 8. Click Save.







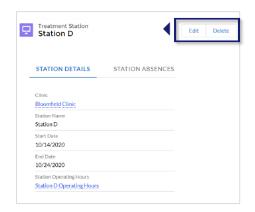




#### **Edit or Delete Treatment Stations**

- 1. Click the **Treatment Stations** tab.
- Click on the Treatment Station to edit or delete in the Treatment Stations table.
- 3. Choose the **Edit** or **Delete** button in the upper right corner of the screen.
- 4. If you chose **Edit**, make the edits then click **Save**.
- 5. If you chose **Delete**, click the **Delete** button in the upper right corner of the pop up.
- When you click Save or Delete, a warning will appear stating current recipient appointments might be canceled due to the updates you are making. To accept your changes, click Delete.





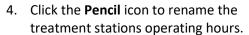




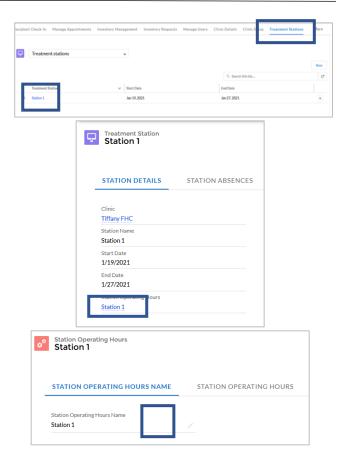


### Rename, Edit, or Delete, Treatment Station Operating Hours and Time Slots

- 1. Click the **Treatment Stations** tab for a list of your treatment stations.
- 2. Choose the **Treatment Station**. You will be taken to the Treatment Station details page.
- 3. Click the **Name** of the operating hours on the Station Details page.



- 5. **Edit** the information.
- 6. Click Save.



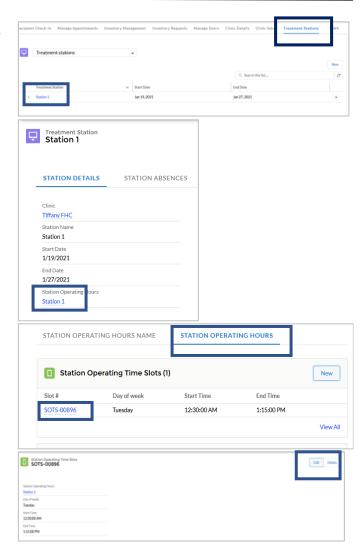




#### **Edit a Treatment Stations Operating Hours:**

- 1. Click on the Treatment Stations tab.
- Choose the Treatment Station Name. You will be taken to the Treatment Station details page.
- 3. Click the **Name** of the operating hours on the Station Details page.

- 4. Click on the **Station Operation Hours** tab.
- 5. Click the **Slot** # for the time slot to edit.
- 6. Click **Edit** or **Delete** in the upper right-hand corner of the time slots page. A popup will appear.
- 7. Complete edits or delete the time slot.
- 8. Click Save.







#### **Create a Clinic Absence**

You can temporarily close your clinic by pausing your normal scheduled hours. During a clinic absence, the system will show your clinic as closed and appointments will not be available to recipients.

If you create a clinic absence and appointments are scheduled, those appointments will be cancelled, and the recipient will receive a notification through their preferred communication method.

- 1. Click the **Clinic Absences** tab to create an absence.
- 2. Click **New** in the upper right corner. A pop-up window will appear.
- 3. Choose your clinic's name in the Clinic field.
- Create a Name and Reason for the absence.
- 5. Select the **Start Date**.
- 6. Select the **End Date**.
- 7. Click Save.

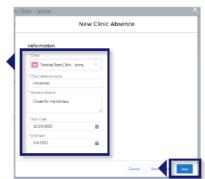
All clinic absences will appear in the **Clinic Absences** table.

To edit or delete the absences:

- 1. Click on the Clinic Name.
- 2. Click **Edit** or **Delete** in the upper right-hand corner.
- NOTE: Updates to the clinic schedule may not immediately appear to the recipients. For example, editing operating hours for Friday on Monday morning may not appear until late Monday evening or Tuesday morning.











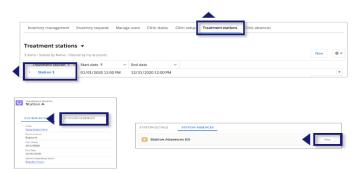
#### **Create a Treatment Station Absence**

You can also create a treatment station absence to temporarily shut down a station due to low staff or inventory. If you create a clinic absence, you do not have to create a treatment station absence. Clinic absences will override any operating hours associated with the treatment stations in your clinic.

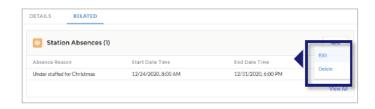
- 1. Click the **Treatment Station** tab.
- 2. Click the **Station Name** in the Treatment Stations table.
- 3. Click the **Station Absences** tab.
- 4. Click New.
- 5. Click in the **Station** box in the pop-up window.
- Select your stations name in the drop-down box. You can also search for your stations name.
- 7. Enter a reason for the absence.
- 8. Select a Start Date.
- 9. Select an **End Date**.
- 10. Click Save.
- 11. A warning will appear notifying you that scheduled appointments will be cancelled for this station.
- 12. Click Ok.
- 13. Click Save.

All Treatment Station absences will appear in the Station Absences tab. To edit or delete the absences:

- 1. Click on the Clinic Name.
- 2. Click **Edit** or **Delete** in the upper right-hand corner.









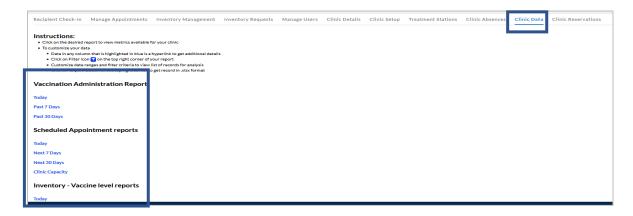


#### **Access Clinic Data**

You will be able to view reports related to your clinic's vaccinations, scheduled appointments, and inventory.

#### To access reports:

- 1. Log into VAMS.
- 2. Click on the Clinic Data tab.
  - You will see Vaccination Administration Report, Scheduled Appointment Reports, and Inventory – Vaccine Level Reports. Under each section, you will see blue links to display details of each report.
- 3. Click a link to view the specific report.



- 4. You will be taken to the report detail page.
- 5. On this page, you will be able to
  - > Filter each column on the table,
  - Search the report for specific data,
  - Refresh the report once filters are applied,
  - Export the data to an excel spreadsheet,
  - > Click the blue links to display clinic or recipient information.







# **Manage VAMS Clinic Users**

#### **Edit or Remove a VAMS Clinic User**

- 1. Click the Manage Users tab.
- 2. Select the **Users Name** to edit their information. You will be taken to the User's Information Page.
- 3. Click **Edit** in the upper right-hand corner.
- 4. Update the information.
- 5. Click Save.

#### To **Remove** the user:

- 6. Click the **Remove** button in the upper right-hand corner.
- 7. A pop-up will appear asking you to confirm that you want to remove the user.
- 8. Choose Yes or No.
- 9. Click Next.













#### Multi-Clinic Users: Add a Clinic User Who is Already Registered as a VAMS User

You can add a user to your clinic who is already registered with another clinic. VAMS recognizes the user by their email address.

- 1. Click the Manage Users tab.
- 2. Click New.



- 3. The **Add or Update User** pop-up will appear.
- 4. Enter the user's email.
- 5. Click Search.
- 6. Enter additional roles, if necessary.
- 7. Click Save.
- ➤ NOTE: If the user is added to VAMS from another clinic, his/her first and last name will be populated in the fields. The users will have the same roles for your clinic. If you change the roles, those roles will be applied to the other clinic.

The user will receive an email stating they were registered to your clinic.

When the user logs into VAMS, he/she will see all clinics they are linked to.







# **Log COVID-19 Vaccine Inventory**

You can log vaccine delivery two different ways:

- 1. Scan the barcodes on the vaccine vials using the 2D scanner. This will automatically enter the vaccines into VAMS.
- 2. Manually enter the information.

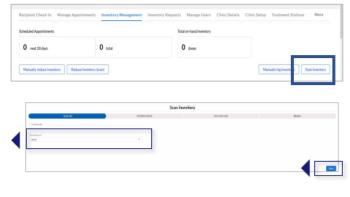
#### **Barcode Types:**

- Unit of Use, UoU, is the vaccine vial.
- Unit of Sale, UoS, is the packaging the vials are delivered in.

#### Log Vaccine Inventory using a 2D Scanner

You must scan each UoS individually. Each UoS contains multiple vials. When logging inventory, you must scan one UoU from each UoS.

- 1. Click the **Inventory Management** tab.
- Click the Scan Inventory button. The Scan Inventory pop-up will appear.
- 3. **Scan** the UoS barcode on the vial using your 2D scanner. The barcode will appear in the barcode field.
- 4. Select the Manufacturer.
- 5. Click **Next**.
- **6.** The UoS information will populate the required fields.
- 7. Enter the total UoU vials.
- 8. Click Next.
- Scan the UoU barcode on one of the vials. It will appear in the barcode field.
- 10. Click Next.
- 11. **Ensure** the information is correct.
- 12. Click Next.
- 13. Click Finish.









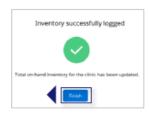
### Log COVID-19 Vaccine Inventory Manually

- 1. Click the **Inventory Management** tab.
- Click Manually Log Inventory. A Manually Log Inventory page will appear.
- 3. Select the **Manufacturer** from the drop-down menu.
- 4. Select the **Product** from the drop-down menu.
- 5. Select the **UoS NDC**.
- 6. Enter the **UoS Lot Number.**
- 7. Enter the **UoU Lot Number**.
- 8. Enter the Total UoU (vials) in UoS.
- 9. Enter the **Expiration Date**.
- 10. Click Next.
- 11. **Ensure** the information is correct.
- 12. Click Next.
- **13.** Click **Finish** in the pop-up window.
- ➤ **NOTE**: When you log inventory, you are logging the number of vials, not doses.











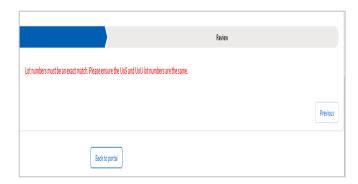


## **Correcting UoS and UoU While Adding New Inventory**

You are now required to enter the UoS and UoU lot numbers that match. If these numbers are entered incorrectly, you will receive an error message. The error message will ask you to invalidate the existing entry and reenter the correct doses using the UoS and UoU lot number before proceeding with the additional inventory entry.

Invalidating the existing entry will **not** correct the lot numbers on recipient records. It **will** correct the unused inventory in VAMS so that future recipient records will reflect accurate lot numbers. Existing recipient records cannot be edited at this time.

- A message appears informing you the lot numbers are not the same.
- Click the **Previous** button to return to the Log Entry page to re-enter the correct information.
- 3. Or, click **Back to Portal** to return to the home page.



**NOTE:** If you entered UoU and UoS numbers that do not match prior to the above error message appearing, you will need to invalidate the inventory before you enter additional inventory. To invalidate inventory:

- 4. Click on the **Inventory Management** tab.
- 5. You will see two columns, UoS and UoU.
- 6. Find the inventory entry that does not match.
- 7. Click the blue **UoS** link. This will take you to the Inventory Details page.
- 8. On this page is the detailed information associated with this inventory. The **Doses Remaining** will be the number that is invalidated.
- 9. Click Invalidate.
- 10. Click Yes to invalidate the inventory.
- 11. The remaining doses will be invalidated. You will need to remember this number. You will be able to return to this page by selecting the blue link on the Inventory Management page.
- 12. On the Inventory Management tab, you will see Invalid for the record that you invalidated.

**NOTE**: You will need to log the correct lot number by using the Logging Inventory section of this guide.





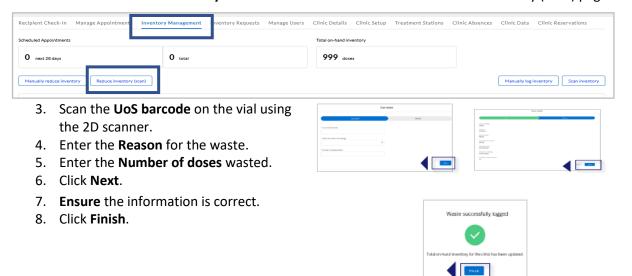
## **Reduce COVID-19 Vaccine Inventory**

You can reduce vaccine inventory two different ways:

- 1 Scan the barcodes on the vaccine vials using the 2D scanner. This will automatically enter the vaccines into VAMS.
- 2 Manually enter the information.

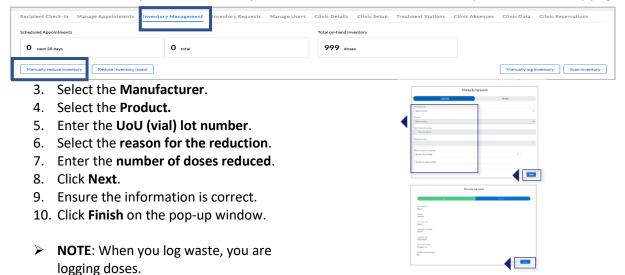
#### Log Vaccine Waste by using the 2D Scanner

- Click the Inventory Management tab.
- 2. Click the **Reduce Inventory** button. You will be directed to the Reduce Inventory (scan) page.



#### **Reduce Inventory Manually**

- 1. Click the **Inventory Management** tab.
- 2. Click Manually Reduce Inventory. You will be directed to the Manually Reduce Inventory page.









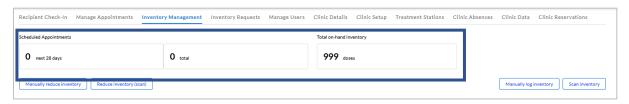
## **Monitor COVID-19 Vaccine Inventory Levels**

You can monitor the Inventory Levels by the Inventory Management page. Inventory levels and snapshots of available and booked appointments can be seen on the Inventory Management page. This page provides you with view of your inventory levels.

On this page, you'll find:

- The number of appointments available for the next 28 days.
- The number of appointments booked.
- The number of vaccine doses your clinic has available.

These numbers are automatically generated from the inventory and waste logged into VAMS.



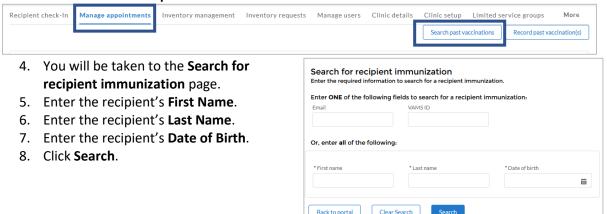




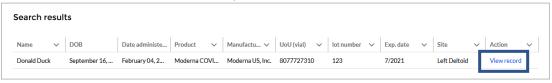
## Invalidate and edit vaccination records

You will now be able to search edit and invalidate a recipient's past vaccinations.

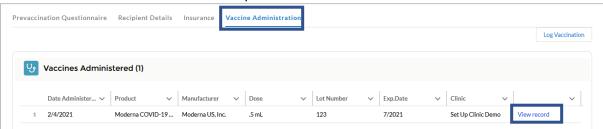
- 1. Open VAMS.
- 2. Click on the Manage appointments tab.
- 3. Click on the Search past vaccinations button.



- 9. If the recipient exists, Search results will appear at the bottom of the screen.
- 10. Click View Record to access the recipients record.



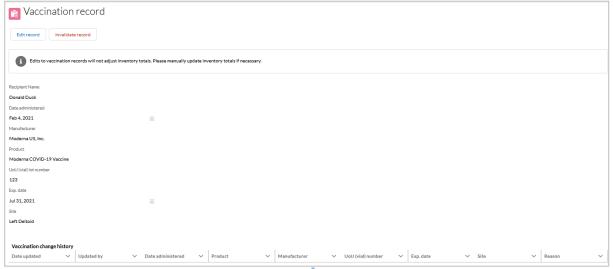
- 11. You are taken to the Recipient's record.
  - ▶ NOTE: The recipient will have one record for each vaccination he/she received at your clinic.
- 12. Click on the Vaccine Administration tab.
- 13. Click **View Record** of the vaccine you wish to access.







- 14. You are taken to the **Vaccination Record** page. On this page, you will find the recipient's vaccination information.
- 15. On this page you have the option to **Edit** or **Invalidate** the vaccine record.



#### To Edit a record:

- 1. Click Edit.
- 2. Update any field of the vaccination.
- 3. Click Save.
- 4. Select the **Reason for the update**.
- 5. Click Save.
- 6. You will be taken back to the **Vacciantion Record** page.
- 7. You will see the **Vaccination change history** table at the bottom of the screen with the changed information.
  - Any updates made to the record will update the recipients account and vaccination certificate.

#### To Invalidate a record:

- 1. Click Invalidate Record.
- 2. Select the Reason for the invalidation.
- 3. Click Invalidate Record.

NOTE: Edits made related to inventory, will need to be manually updated in the inventory records.





## **Add Mobile Clinic Locations and Operating Hours**

NOTE: A Clinic Administrator is NOT able to change the Clinic Type (i.e., standard, third party, mobile, etc.). If needed, please contact your Jurisdiction POC to set up an additional clinic.

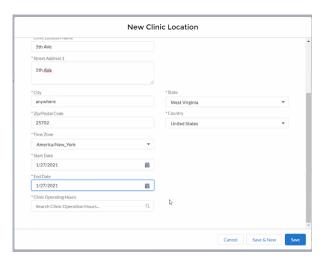
Mobile clinics have multiple locations for vaccinations. These locations have a permanent shipping address, for inventory, but may change their physical address. You can add new addresses and operating hours for each location after completing the mobile clinic's registration. Once a new clinic is set up, you can also edit or delete them on this page.

#### To Add a New Clinic Location

- 1. Click the Clinic Setup tab.
- 2. Click **New**. A **New Clinic Location** pop-up will appear.



- 3. Select the **Clinic** in the **Clinic field** box.
- 4. Name the Clinic Location.
- 5. Enter the Address.
- 6. Select the **Time Zone**.
- 7. Enter the **Start Date**.
- 8. Enter the **End Date**.
- 9. Select the Clinic Operating Hours.
- 10. Click Save.
- NOTE: Overlapping start and end dates with another location will give you an error message.



#### To Set Operating Hours for the New Clinic:

- 1. To create new operating hours, see **Set Up Clinic Schedule**.
- 2. To make this available for recipients, click the **Available for Scheduling?** checkbox at the top of the window.
- 3. Click Save.





# **Access Multiple Clinics in VAMS**

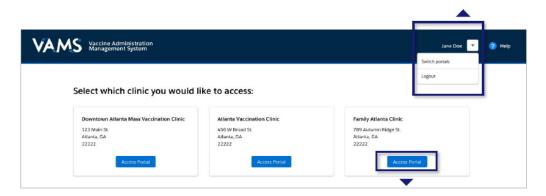
If the Clinic Administrator adds you as a user at their clinic, you can access the other clinics once you have logged into VAMS.

- 1. On any page in VAMS, click on the **drop-down arrow** next to your name in the upper right-hand side of the screen.
- 2. Click Switch Portals.

If you have multi-user access, you will be taken to the portal selection page.

- 1. Click the Clinic Portal button.
- 2. You will be taken to the **Clinic Selection** page.
- 3. Select the Access Portal button of the clinic you would like to access.

If you have multi-clinic access, if you click **Switch Portals**, you will be taken to the **Clinic Selection** page.







# **Search for an Existing Recipient**

You can search, view and add recipients using the **Search for existing recipient** button. VAMS will search for all recipients, including those registered in VAMS as recipients and those added to third-party clinics. Once a recipient is found, you will be able to schedule a walk-in appointment or schedule them for a future appointment.

#### To search for a recipient:

1. Click the **Search for existing recipient** button. You'll be directed to the Search for Recipient page.



#### On the Search for Recipient page,

- 2. Enter the recipient's Email, VAMS system ID or External system ID.
- 3. Or enter the recipient's First Name, Last Name or Date of Birth.
- 4. Click Search.



5. If the recipient exists, a **Search Results** table will appear below.



- 6. If you want to add the recipient to your clinic, click the **Schedule walk in**.
- 7. You will be taken to another screen that notifies you of the next available walk-in appointment. The recipient will be reserved for that future appointment.







## **Deactivate Your Clinic**

You can deactivate your clinic when it is no longer needed to administer COVID-19 vaccines.

#### Deactivating will:

- Send an email to the jurisdiction POC stating the clinic was deactivated.
- > Send a cancellation email to any recipient scheduled for an appointment at that clinic.
- > Cancel all recipient appointments scheduled at that clinic.
- > Remove the clinic in the search option.
- Deactivate all clinic inventory requests.
- Close all open appointments.

#### To Deactivate Your Clinic:

- 1. Click the Clinic Details tab.
- 2. Click the **Deactivate Clinic** button.
- A pop up will appear asking you to confirm deactivation. You will also see any booked appointments and inventory for the clinic.
- 4. Click Deactivate Clinic.
- NOTE: Deactivating a clinic will not remove your user permissions. Once a clinic is deactivated, each user must be removed from VAMS following the same process in Manage VAMS Users.









# **Glossary of Terms**

Word/Phrase	Definition
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain vaccine product identification information, lot number, and expiration date.
Member	Any worker, staff member, volunteer, other personnel or organization being added to VAMS to receive COVID-19 vaccine.
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., mobile clinic bus or van).
Multi-clinic User	A clinic user who performs the same or different roles at multiple clinics registered in VAMS. This user can switch between clinic accounts within the clinic portal.
Multi-user	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is registered as a VAMS recipient can access the Clinic Portal and Recipient Portal).
Organization	Any institution, association, company, or other group that will add their essential workers to VAMS.
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., clinic set up in a school gym that will stay at that location while it is open).
Third Party Clinic	A vaccination clinic established at a facility like a long-term care facility or correctional facility where the facility will be responsible for administering vaccines to recipients.
Treatment Station	Vaccination stations are currently called "treatment stations" in VAMS and therefore in parts of this user manual.
Unit of Sale (UoS)	The packaging in which the vaccine vials are delivered.
Unit of Use (UoU)	The vaccine vials.
Vaccine Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a 'vaccine clinic' in VAMS and their user manual).